Part-Time Executive Assistant
Job Specification

Would you like the opportunity to work within a growing, dynamic, wealth management firm? We are seeking a candidate to join MASECO Private Wealth as a Part-Time Executive Assistant to support a 3-person team consisting of Senior Wealth Manager (& Partner), Senior Wealth Planner and Senior Wealth Associate. You will report to the Senior Wealth Manager.

The ideal candidate would be organised, personable and have a keen eye for detail. Previous Executive Assistant / Personal Assistant experience within a wealth management firm would be preferable but is not mandatory. Please note, although the role is not client facing, telephone conversations with clients (e.g. booking meetings, directing incoming calls to the wealth pod etc…) will be required.

The ability to interact with staff (at all levels) in a fast-paced environment, sometimes under pressure while remaining calm and flexible, proactive, resourceful and efficient with a high level of professionalism and confidentiality is crucial to this role. Strong written and verbal communication skills and attention to detail are equally important.

About MASECO Private Wealth

MASECO Private Wealth was founded in 2008 in the wake of the non-domicile tax rules being introduced in the UK. The Partners had previously developed the US/UK private client desk within a large Private Bank in London. They realised that as a result of these legislative changes, a different approach would be required to service the needs of US citizens living in the UK. The alternative structure needed to remain not only tax-efficient and cost effective for American individuals living in the UK but would also need to be built upon global best practices. Just 14 years later, MASECO oversees over $2.6 billion in assets for approximately 800 families.

What we do

MASECO develops and implements global, tax-efficient wealth strategies for families, trusts and foundations based in the UK, USA and internationally. Our aim is to deliver expert advice, designed to simplify and tackle the complexities associated with cross-border wealth management. We deliver comprehensive wealth management and investment advice to clients based on trust and open communication. Our mission is to guide families with cross-border economic interests to a meaningful financial future. MASECO's Wealth Management equation provides a framework for the delivery of a systematic wealth management offering:

Wealth Management = Investment Management + Wealth Planning + Relationship Management

MASECO

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Our Values

MASECO has a core set of values that form the foundation of everything we do. This translates into behaviour that is consistently applied and communicated both internally among our employees and externally among our clients. We strive to provide a Phenomenal Client Experience and seek to work with individuals and intermediaries who understand and appreciate our DNA. We believe that as an organisation we have multiple responsibilities – to our clients, our employees, our suppliers and to the world around us. MASECO strives to ensure that decisions are made with these responsibilities in mind.

MASECO is proud to be the UK's first financial services B Corporation member. B Corp is an alternative vision of the role of business in society. It is an assertion that businesses can benefit shareholders whilst also solving social and environmental problems. We want to influence the way investing and charitable giving are viewed in both the financial and wider communities, and to promote the standards of accountability that being a B Corp member represents. www.bcorporation.net

Specific duties and responsibilities include:

- Diary management for specified Wealth Pod, including via email and phone
    - Organising 200+ meetings and phone calls per year
- Answering and directing calls for specified Wealth Pod
- Completing meeting preparation for specified Wealth Pod
- Collecting data from various investment platforms and pasting into templates for review by the specified Wealth Pod
- Helping maintain accurate client files and CRM records for specified Wealth Pod
    - Including updating internal records, scanning and e-filing documents
- Helping complete company projects to improve data integrity within our internal systems for specified Wealth Pod
    - This includes data checking – one system vs another
    - This includes data input – from paper / a spreadsheet to an electronic system
- Helping maintain internal tracking spreadsheets for specified Wealth Pod
- Sending regulatory documents to clients for specified Wealth Pod
    - This will include quarterly and annual regulatory disclosure documents
- Ordering surprise and delights for specified Wealth Pod
- Logging expenses for specified Wealth Pod
- Maintaining CPD logs for specified Wealth Manager
- Completing personal admin for specified Wealth Manager
- Any other ad-hoc admin tasks for specified Wealth Pod

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Skills and specifications for the role:

- Strong organisational skills with close attention to detail to maintain the highest level of quality
- Self-motivated with efficient time management skills to plan workload and prioritise accordingly
- Deploy assertiveness skills and use initiative when appropriate to build and maintain good relationships across the company
- Excellent interpersonal skills; able to listen and converse well on all levels as well as exceptional written and verbal communication skills
- Team player with experience of working in a team environment, able to identify and help others when required
- Tactful, trustworthy, diplomatic and able to maintain confidentiality
- Hold values that are in line with our own and that will help strengthen our culture.

Education and qualification requirements:

- Strong knowledge of MS Office Suite; Excel, Word and Power point

The base compensation is per annum and a discretionary bonus plan and competitive benefits plan is offered.

The closing date for applications is open ended. Please submit your CV with a covering letter to hr@masecopw.com.

Data Protection Notice

MASECO LLP is dedicated to protecting the confidentiality and privacy of personal data entrusted to us. We comply with all relevant data protection laws, including the EU General Data Protection Regulation (GDPR). Please read the notice below in conjunction with the firm's Data Protection Policy which can be found on our website.

Legitimate Interest

In providing us with your CV you agree that we will use the personal data within that document for the purposes of assessing your suitability as a candidate for the specified role and, accordingly, we have a legitimate interest in such data. The personal data we use includes:

- Your name and personal details (including contact information, such as your primary and other residential
- address; your email address; your personal mobile telephone number or landline; your unique tax identifier
- (such as your National Insurance number); your driving licence and/or passport details;

- Your date of birth and/or age;
- Financial details, such as your current salary;
- Education and employment details.

Consent

By providing us with:

- your personal data, you consent to our using that personal data to perform checks with credit reference or fraud prevention agencies which may include obtaining information on you from other sources, such as the electoral roll, court records of debt judgments and bankruptcies and other publicly available sources as well as information obtained through social and other media, such as LinkedIn; and
- any sensitive personal data (such as your racial or ethnic origin or data concerning your physical or mental health or gender orientation), you are agreeing to our processing of that data for the purposes of assessing your suitability as a candidate for the specified role.

Retention

If you are not successful as a candidate for the particular role for which you apply, we will typically retain your personal data and other information you have provided to us or we have obtained about you in the course of the job application process for a period of up to 12 months from the date on which the job vacancy has been filled. If you would prefer that we remove your information from our records prior to this date, please contact us, however, we will continue to hold any information which we are required to retain under applicable laws and regulations. Should we wish to hold information about you, including personal data, for a longer period of time, we will seek your consent.